

ITMC 2015 Project Excellence Awards

Project Title: Electronic Contract Routing & Signature Process

Agency: Commerce

Nominated by: Larry Krause

Team Leader/ Members: Teri Juneau / Larry Krause

Summary Paragraph: Historically Commerce has used a traditional paper based work flow for routing contracts for review/approval, and signatures. Paper copies of the contracts had to be moved around manually for internal processing, and inter-agency mail services, USPS or FedEx was used to transmit the documents externally for signatures. This process was labor intensive and very slow with some contracts taking nearly a month to be processed. The completed contracts were then scanned and placed in the departmental electronic storage (FileNet) for long term storage and management.

Project Description: We piloted a process with another electronic signature vendor and found deficiencies before arriving at the use of the cloud based DocuSign service provider. After gaining approval from State Procurement and other appropriate DOA entities we implemented the use of the DocuSign service on all contracts. Our processes were revised, such that all contracts are now submitted electronically (WORD & PDF formats) to our fiscal area, where internal review is performed (fiscal, legal, IT if appropriate), and then the contracts are prepared within the DocuSign environment. Obviously, depending on the contract and/or originating program different entities are required to sign the documents or receive copies (before or after signatures) for their notification. Templates have been established to reduce the amount of 'prep' time needed to prepare the document for signature. Within our environment, we have some contracts that require nearly 20 signatures – both from within the State's enterprise also from the public whether it's the vendor community, local government officials, or other entities we interact with. As a final step in the process (all the signatures have

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been obtained), our Records Management personnel receive an email with the completed contract attached. The electronic image is then loaded in our contracts master catalog in FileNet and the process is complete.

This process has resulted in a huge time savings for Commerce. We quite literally now have contracts that once initiated into the process are completely signed, distributed and stored in a matter of hours.

Tracking contracts in the process is simple, straightforward and efficient. If someone 'loses or misplaces' their email notification to sign a contract, it is a simple process to issue them a reminder. Email addresses are also easily corrected. Tracking/reporting of contracts in process is straightforward and can be scheduled and/or tailored to our needs.

We have many people that are often traveling – they sign the documents they receive with their mobile device(s) and the process has been a tremendous efficiency measure for our mobile employees.

The efficiency and savings we anticipated was far surpassed by implementing this service. We had some concern from some users initially, but our communications program and persistence has been successful in over-coming virtually all of them.

We implemented this process for contracts, but also use it for other 'one off' documents as well such as web filtering requests or other items that require a timely signature.

